Performance Review Guide

Frequently Asked Questions

Q. When is a probationary performance review needed?

When there is a...

- New Hire employee full-time (.50 FTE or more)
- New Hire employee part-time (.49 FTE or less)
- *Change to a new classification or skill level within same department (voluntary or involuntary)
- *Change to a new classification or skill level in a different department (voluntary or involuntary)
- Change to a new classification or skill level that is in a different bargaining unit
- In Class or In-Skill Progression

If it is a lateral move and employee has already obtained permanency, then no probationary review needed.

For example, if employee is a permanent ASC I and is moving to another ASC I classification within same (or different) department, then no probationary review is needed. Same with Technical Levels - If permanent employee is moving from a Career Level position to another Career Level position regardless of if it is within the department or different, no probationary review is required.

On the contrary, if the employee is a permanent ASC I and gets an in-range/in-skill progression to an ASC II, then a new probationary will start and will require probationary evaluations.

Q. My employee has not been reviewed since 2012. How do I bring them back on the evaluation track with the new cycle? Can I do one evaluation for the missing years?

An employee can only be evaluated for a maximum period of 12 months. Do one review for the most current cycle only.

Q. Do I need to attach a position description and/or self-evaluations with the final performance review?

No, it is not needed. However, it is a good idea to review the positions description with the employee to be sure that it is current. Self-evaluations are a tool for the manager to determine where gaps may be in how the employee views their work versus how it is viewed by the manager. It is not an official document.

Q. Can you clarify on how to answer the following two (2) questions that are on the first page of the CSUEU evaluation form: 1) Has current Position Description (PD) been discussed and is it up to date? 2) Any changes to current Position Description since the last Annual Performance Review?

1) If the position description you are evaluating your employee is current during their evaluation period, then answer "Yes.

2a) Answer "Yes" if there have been any changes to the employee's position description during the evaluation period that University Personnel is unaware of or was made AFTER the current position was updated. We also want to make sure that the modified PD is in their official personnel files. If you have any questions regarding your employee's PD, please work with the Classification and Compensation team.

2b) If there are no changes during the evaluation period, then answer "No".

For questions 1 & 2, you can always contact Employee Relations to view your employee's position description.

Q. What if my employee wants to bring their union representative or shop steward to the evaluation meeting?

A meeting regarding the employee's performance evaluation is not considered disciplinary and is not an investigatory meeting that will lead to discipline. Therefore, you are not obligated to allow a shop steward or union representative to be present at this meeting.

CSUEU Employees may request to have their representative be present for the **final evaluation meeting discussion.*

Q. Can a University Personnel Representative be present at the meeting?

The performance evaluation discussion is a great way for the supervisor and employee to build trust and rapport even when discussing difficult or uncomfortable topics relating to performance. University Personnel can offer support and guidance through the process, but outside of the actual meeting.

Q. What if the employee refuses to sign the evaluation?

Please write "Employee refused to sign" on the document. A signature acknowledges that a discussion took place and does not mean that the employee agrees with the evaluation. This verbiage is stated on the signature page of the evaluation.

Q. What if my employee wants to submit a rebuttal to the evaluation?

Keep in mind that if the employee chooses to submit a rebuttal statement, then it is part of the performance evaluation process and should be attached to the final evaluation.

Please contact the Office for Employee and Labor Relations for more detailed contractual information regarding rebuttals.

Q. What if the employee is not available due to a leave or vacation? Do we wait until the employee comes back to do the evaluation?

If the employee is on vacation, the supervisor must make the appropriate arrangements to complete the draft evaluation. Once the employee returns from vacation, they should be provided sufficient time, as required by the CBA, to review the draft and provide feedback prior to having the final evaluation.

For leaves, employees should only be evaluated during the period they actually worked. If an employee took a 3-month approved leave of absence, the time is not counted in their evaluation. Additionally, if the employee is on probation, their probation may be extended per the CBA (please consult with University Personnel).

Q. When should I complete the probationary performance review for my employee?

You should assess the employee's performance during their respective probationary time periods. The probationary performance evaluation should then be completed within two weeks after their full probationary time period. Each CBA has a different timeline for probationary employees.

For example: If a 6-month evaluation needs to be completed for an employee and their 6-month ends on November 30, then the meeting should take place with the employee after November 30, but no later than December 11.

*Please note that employee status (i.e. bargaining unit, confidential or MPP) will determine the probationary period cycles. Please consult with the Office for Employee and Labor Relations or the appropriate Collective Bargaining Agreement regarding probationary review period.

Q. What if my Employee has a personnel action (such as change in position/department/bargaining unit) during the middle of the annual evaluation period? For example: If my employee, an SSP I who is a permanent employee is promoted to a SSP II on August 15. How should I handle the evaluation dates?

Please use appropriate dates of when the employee was in the position/department being evaluated. In this example, the annual evaluation dates for this employee would run from April 1 thru August 14. Keep in mind that this change results in a new probationary period for that employee.

The dates should coincide with the information in PeopleSoft. Please contact the Office for Employee and Labor Relations for guidance on evaluation dates.

Q. Are reviews needed for Special Consultants?

No, reviews are not required for Special Consultants.

Q. Are reviews needed for temporary employees?

Please consult with Employee Relations regarding contractual obligations for evaluating a temporary employee. If completing an evaluation for a temporary employee, please use the Annual Performance Evaluation Form and indicate on the form that this employee is "Temporary".

* For CSUEU employees, if the appointment is 12 months or longer, then the employee shall receive at least once performance evaluation during each 12-month period of the appointment.

Q. I was not the employee's supervisor for a majority of the review period, should I still be the evaluator?

Yes, you are considered the supervisor of this employee. You may want to review prior evaluations and speak to individuals that may have observed or have knowledge of the employee's performance during the evaluation period to assist you with completing the evaluation. Also, use this meeting as a time to focus on goals and expectations for the coming year since these may have changed given shifting demands and new priorities.

Q. Is there a training course on performance evaluations available to managers?

Yes, please contact Organizational Development and Enrichment Programs (ODEP) in University Personnel, at up-org-development@sjsu.edu if you would like to learn more about training on this topic.

TIPS and TOOLS

There are two (2) reports in PeopleSoft that can be utilized to assist with ensuring accuracy when completing general information. These reports capture all active and leave employees, excluding Unit 3, Unit 11 and E99 employees, and provide general employee information.
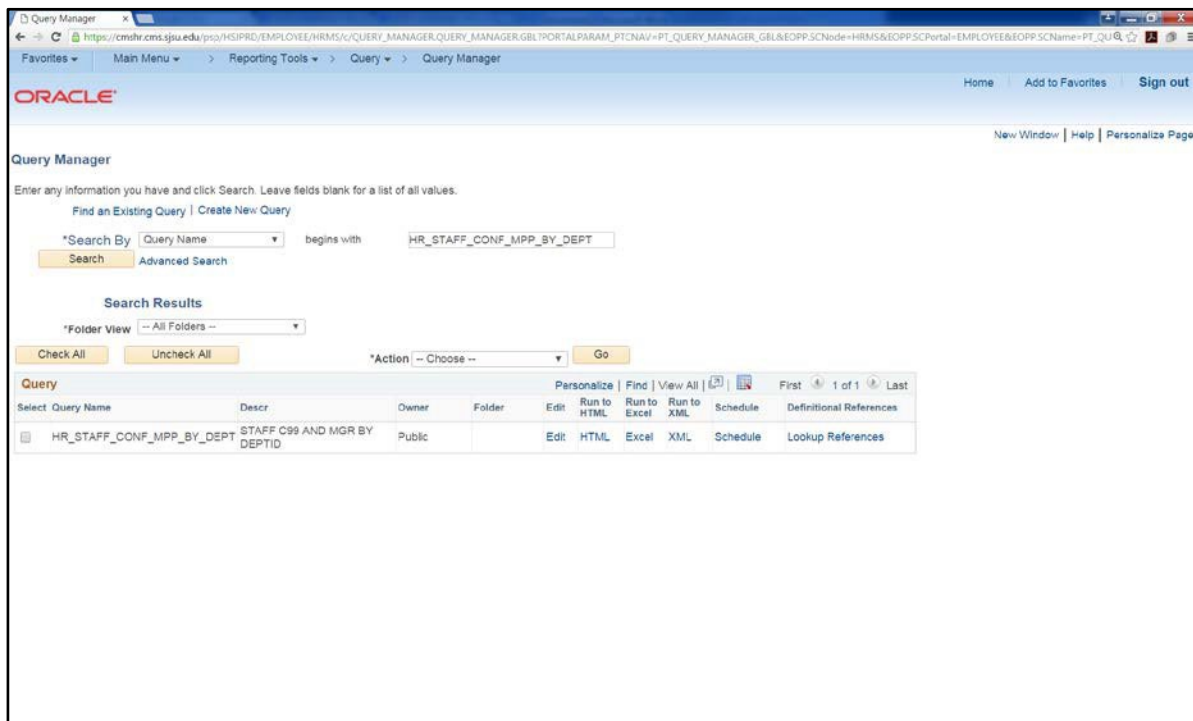
How to Run the Report:
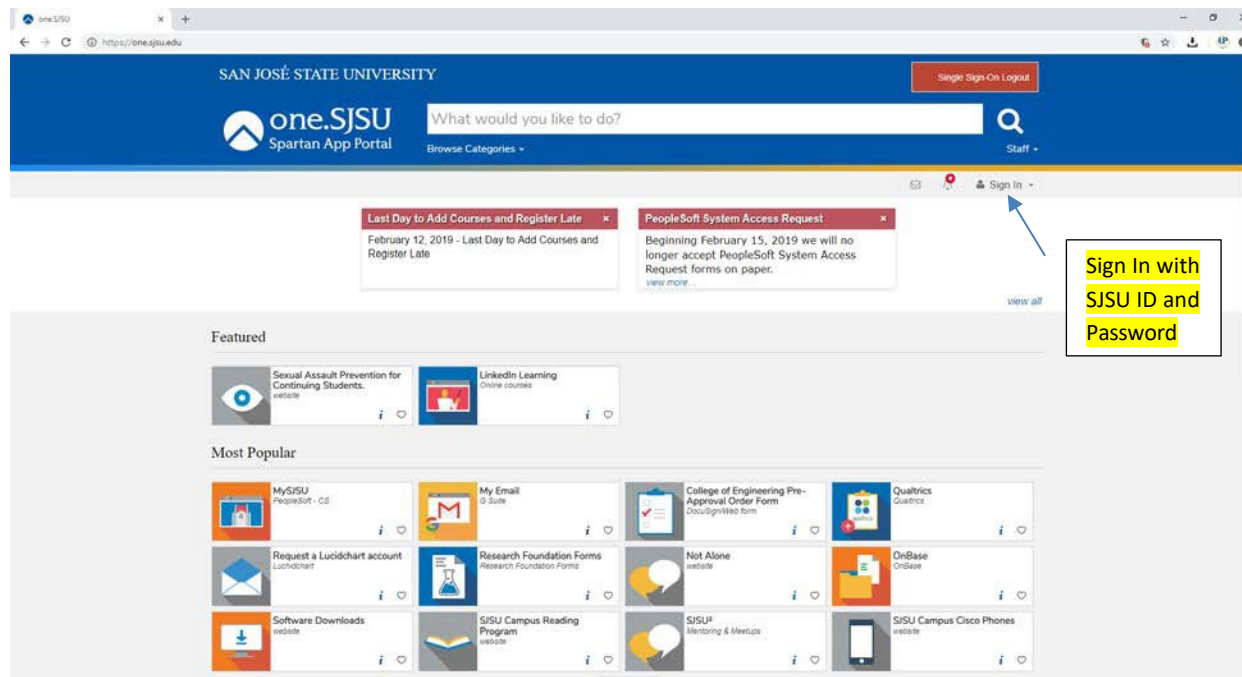
- **Navigate to one.SJSU (https://one.sjsu.edu/)**
- **Sign In with your SJSU ID and Password**
- **Select - SJSU@Work *PeopleSoft - HR***
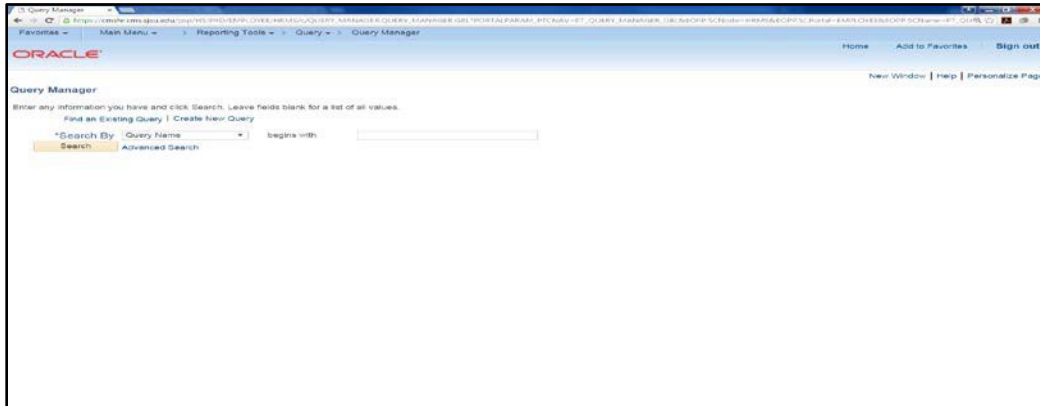
- **Navigate to Query Manager:**
  Main Menu → Reporting Tools→ Query → Query Manager
- **Input Query Name and click on "Search" Details about each report found on the following page.**
  - ○ HR_STAFF_CONF_MPP_RPTTO_EMPLID
  - ○ HR_STAFF_CONF_MPP_BY_DEPT

- **The report can be ran by HTML, Excel, or XML. It is recommended that the report be run in Excel.**
- **Click on the "Excel" link**
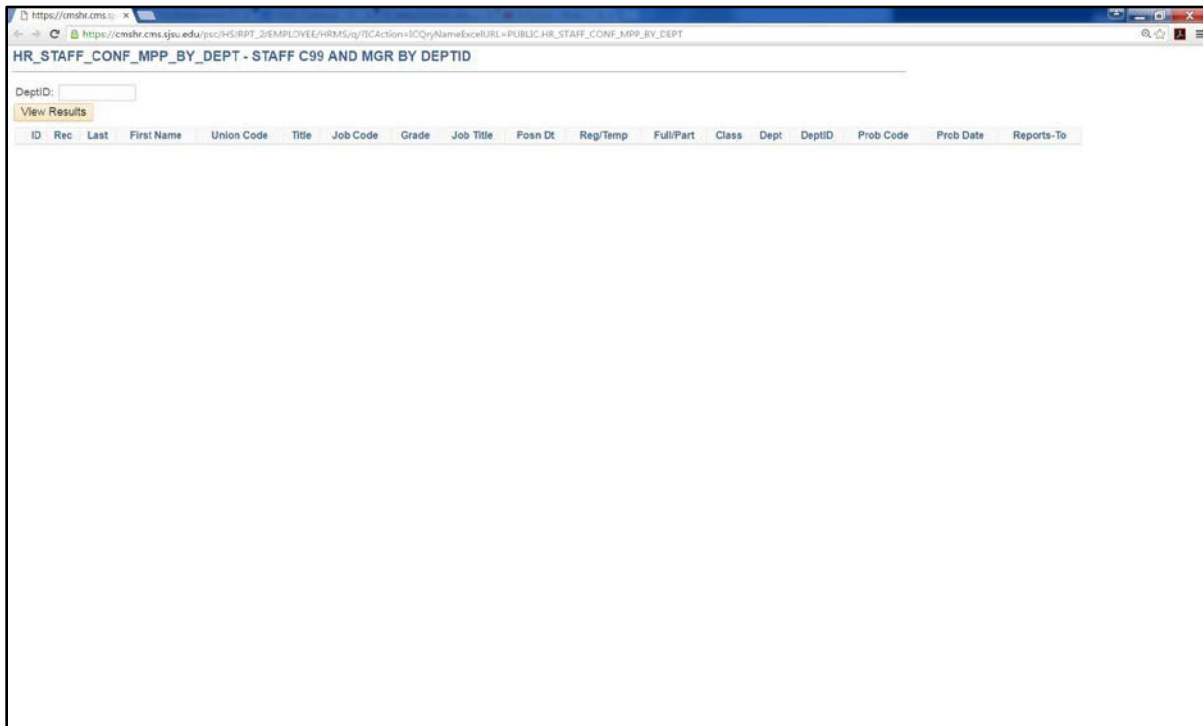
- **You will be prompted to enter either a Department ID or an Employee ID. The example above is a screenshot of when prompted by a Department ID.**
- If you use Report Name: **HR_STAFF_CONF_MPP_RPTTO_EMPLID**
  - Prompted by Employee ID (9 digits)
  - Displays list of employees that report to the Employee ID inputted in the prompt
- If you use Report Name: **HR_STAFF_CONF_MPP_BY_DEPT**
  - Prompted by Department ID (4 digits)
  - Displays list of employees with the Department ID inputted in the prompt
- **Click on "View Results"**

Notes Regarding Query Reports:

- The date you run the report is when data is captured.
- The "Posn Dt**"** field refers to the effective date of when the employee started that position.
- The "Job Title" field is the employee's classification
- The "Title" field is the employee's working title.
- The "Grade" field is useful if the employee's classification is within the Information Technology Series. The "Grade" field corresponds to the skill level.
  - Grade 1 = Foundation
  - Grade 2 = Career
  - Grade 3 = Expert
    - For Example: If the title is "Analyst/Programmer" and the "Grade" is "2", then the Classification is "Analyst/Programmer, Career".

Some tips to consider and areas to double check for accuracy when completing the performance evaluation:

Employee's Name	The employee's legal name (as listed in the report) and not a nickname should be used.
Employee ID	There should be nine (9) digits
Classification or Title	Either the employee's working title or classification should be used.
Comments or No Comments	If the evaluation has a section for the employee to indicate if they would like to include comments or not, please ensure that the employee has made the indication
Dates	Dates in fields such as "Draft Date" or "Review Period", should be inputted as "Month/Day/Year"
Annual vs. Probationary Evaluation	Please ensure that you are using the correct evaluation form depending if this is an annual or probationary evaluation

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Performance Review Snapshot

Bargaining Units & Other Employee Groups	Probationary Period	Probationary Employee Review Cycles	Permanent Employees Review Cycle	Temporary Employees
Unit 1 – UAPD Union of American Physicians & Dentists	18-months (full-time) Article 11.9	Silent- Periodic intervals during probationary period Article 13.1	Annual: April 1 – March 31 Article 13.3	Silent- Periodic intervals Article 13.1
Unit 2, 5, 7 & 9 CSUEU California State Employees' Union	1 year Article 9.11	3 month, 6 month and 11 month Article 10.2	Annual: April 1 – March 31 Article 10.1	Periodic intervals. If appointment is 12 months or longer, than at least one within the 12-month period. Article 10.3
Unit 4 – APC Academic Professionals of California	1 year equivalent (full-time) Article 14.3	Silent- Periodic intervals with at one during probationary period. Article 18	Annual: April 1 – March 31 Article 18	Silent- Periodic intervals with at least one annually. Article 18
Unit 6 Teamsters Local 2010	1 year equivalent (full-time) Article 11.2	Within 2 weeks of having completed 6th month and 11th month. Article 12.5	Annual: April 1 – March 31 Article 12	At least one annually and/or per appointment. Article 12.6
Unit 8 – SUPA Statewide University Police Association	1 year equivalent (full-time) *Not to include P.O.S.T Article 11.3	6th month, 9th month, and 12 month Article 11.4	Annual: April 1 – March 31 Article 29	Silent- Periodic intervals with at least one annually.
Confidential Employees C99	Non-academic: 1 year equivalent (full-time) Administrative: 2 years equivalent (full-time)	Silent- Periodic intervals with at least one during probationary period. Strongly recommended at 6 months.	Annual: April 1 – March 31	Silent- Periodic intervals with at least one annually.
Management Personnel Plan MPP	N/A (MPP employees are at-will)	N/A (MPP employees are at-will)	Annual: July 1 – June 30 New MPPs - 6-months, then at 12-months.	Silent- Period intervals with at least one annually.

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